

**Using Web-based Resources to Enhance Quality and Efficiency of Evaluations – and the Success of Your Practice**

Christopher Brigham, MD, MMS, FAIME, CMLE

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**Learning Objectives**



1. Discuss how web-based tools and other technology resources will enhance the success and profitability of your medicolegal and/or independent medical evaluation practice.
2. Identify at least five resources that will have a significant positive impact on the work you perform resulting in enhanced quality, efficiency and profitability.,

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**What are the keys to your success?**



1. Understand the needs of your clients and market successfully.
2. Approach as a business, with planning and skillful execution.
3. Use best practice approaches that result in high-quality service and leverage your time with technology (web-based and other) and virtual resources.
4. Provide quality valued service that maintains and attracts clients.
5. Minimize your expenses and risks.

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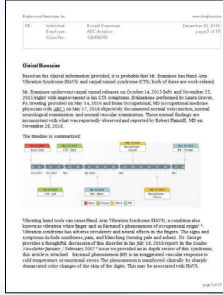
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### End-product of an evaluation is often a report

- Reflective of thoughtful quality evaluation.
- Provides reliable data obtained from document review, history, exam, and studies.
- Questions asked by the client are answered with supporting data.
- Professional appearance and organized.



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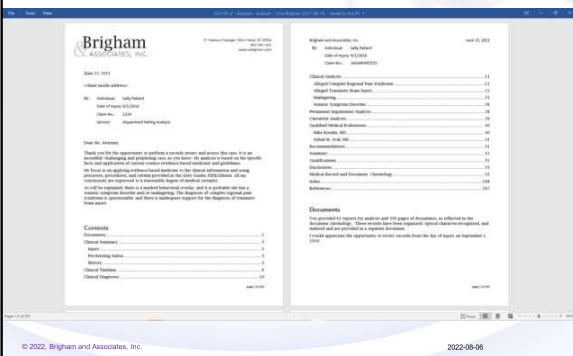
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### Report Example



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### What are best practices?

- Goal is to define an efficient process resulting in a quality work product in a timely manner.
- Each step should reflect best practices and use appropriate technologies.



1. Pre-evaluation
2. Evaluation
3. Post-evaluation

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**Process – Reflecting Best Practices**

**Data In** → **Analysis** → **Data Out**

- Case-specific
  - Records, documents, imaging, and other studies
  - History and inventories – (Physical examination)
- Current science and guidelines
  - Evidence-based medicine and accepted guidelines, e.g., *AMA Guides*.

- Written report
- Verbal report
- Deposition / testimony

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**Use of Web-based Resources and other Technologies**

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**Why?**

- Improve
  - Quality
  - Efficiency (leverage, you are highly valued)
  - Productivity
  - Satisfaction (for you and your clients)
  - Profitability
- Increase valued referrals
- Reduce overhead, risks, and hassles

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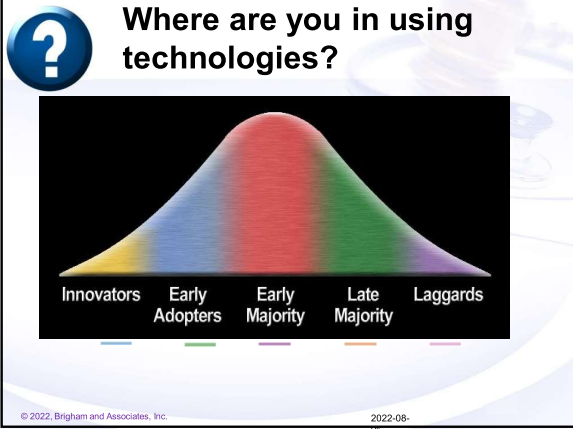
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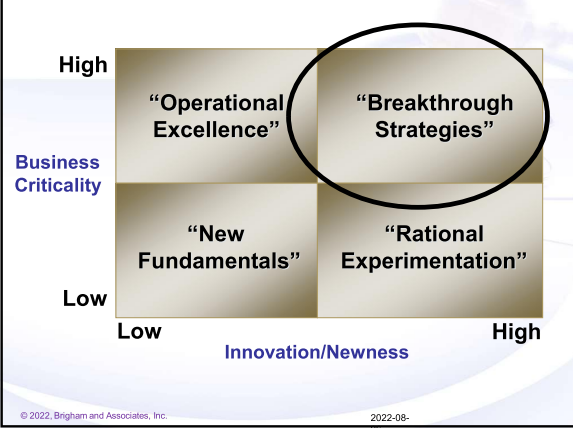
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**Key Points**

1. Aim for operational excellence and breakthrough strategies.
2. Understand that solutions are based on your specific needs.
3. Use software and cloud-based systems with discernment and more fully.
4. Identify and use, as appropriate for you, specialty solutions (software, cloud-based and offshore).

*Note: Most physicians involved in medicolegal work are typically not as effective in using technologies as are their clients.*

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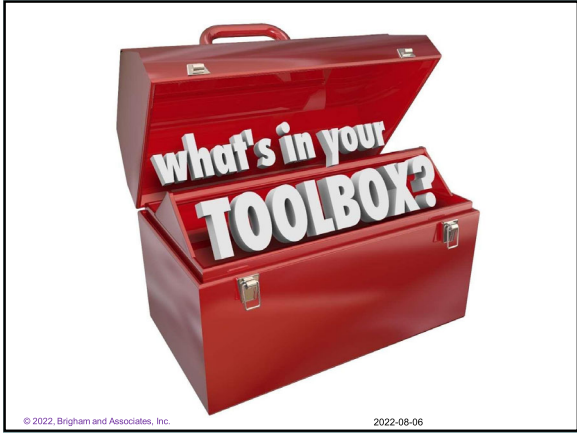
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**No More Paper!**



[Adobe Acrobat](#) - Pro or DC (Cloud)

- Use tools!
- Pages: Insert / extract, insert watermark, bates numbering, headers, footers . . .
- Recognize Text – always!
- Protect
- Sign and certify

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THE WALL STREET JOURNAL

Home World U.S. Politics Economy Business Tech Markets Opinion Arts Life Real Estate

**BANKRUPTCY BEAT**

**Burglary Triggers Medical Records Firm's Collapse**

By KATY STECH  
 Mar 12, 2018 12:39 pm ET

The New Year's Eve burglary of a California office building has led to the collapse of a national medical records firm.

Impairment Resources LLC filed for bankruptcy Friday after the break-in at its San Diego headquarters led to the electronic escape of detailed medical information for roughly 14,000 people, according to papers filed in U.S. Bankruptcy Court in Wilmington, Del. That information included patient addresses, social security numbers and medical diagnoses.

Police never caught the criminals, and company executives were required by law to report the breach to state attorneys general and the Department of Labor's Office of Inspector General. Some of those agencies, including the Department of Labor, are still investigating the matter. The company will discuss the breach.

Most Popular

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4. Put Fin

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### Document Development

- [TextExpander](#), [Breevy](#), or equivalent text expander
- [Dragon Naturally Speaking](#), Dictate in Word, Otter.AI, or equivalent transcription software
- [PDF Index Generator](#) creates indexes for PDF documents
- [Timeline Maker Pro](#) creates timelines

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### Text Expanders

- Use text expanders to save typing in preparing documents, emails, and other common repetitive tasks
- Create a word, phrase, paragraph
- Assign an abbreviation
- When an abbreviation is typed, content instantly replaces the abbreviation
- <https://www.textexpander.com>  
Cost \$40/year



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### Transcription Software

- [Dragon Naturally Speaking](#)
- Dictation within Word
- Otter AI
  - <https://www.otter.ai> Free or \$100 – 240 / year (also provides a transcription of Zoom meetings)



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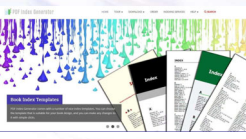
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### Index Generator

- **PDF Index Generator** creates indexes for PDF documents that have been OCRd
- <https://www.pdfindexgenerator.com/> \$70 purchase (one-time), need to purchase or create word list



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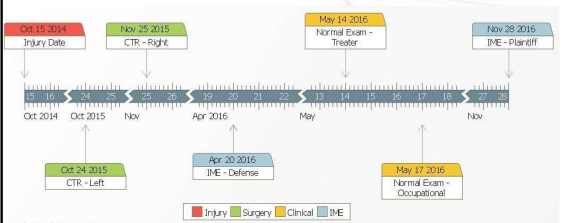
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### Timeline Maker Pro

- Creates timelines easily
- Enter data and chart is created – instantly
- \$149 one-time purchase



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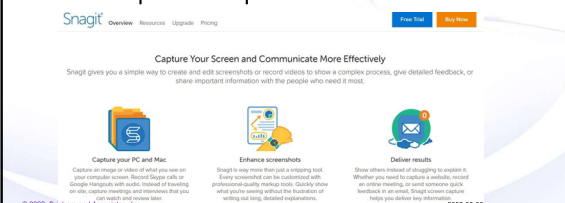
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### Images

- Screen capture (e.g., Snipping Tool, Snagit).
- Capture content in records, articles, or on the web. Edit, if needed.
- Use in reports and presentations.



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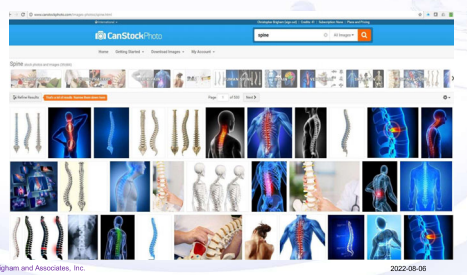
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### Images

- Search (Google Images) – note copyright issues.
- Image Libraries (e.g., [CanStockPhoto](#))



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### Presentations

- [PresentationPro](#) or other templates / image libraries
- [Camtasia](#) or equivalent video editor and screen recorder
- Image library (cloud-based), royalty-free (e.g., [Shutterstock](#), [CanStockPhoto](#))



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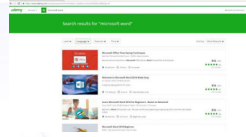
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### Software considerations.

- Personal computer (PC vs. Mac) vs. Cloud-based (also providing use via iPad or tablet)
- Subscription (lease) vs. purchase
- Learn how to most effectively use systems (most access only a small fraction of resources, e.g., in Word, use of styles, references, indexing, proofing, etc.)
  - Online (company, [Udemy](#), or equivalent) or local training



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### Cloud Computing

- Internet
- Security
- Communications
- Marketing
- Documents
- Financial
- Website development

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### Internet

- Browser options ([Chrome](#), [Firefox](#), [Edge](#), [Safari](#), etc.)
- [Roboform](#) or equivalent password manager
- File systems (e.g., [Hightail](#), [Dropbox](#), [SugarSync](#), [OneDrive](#), [Google Drive](#))
- Backup (e.g., [Carbonite](#) or one of above)

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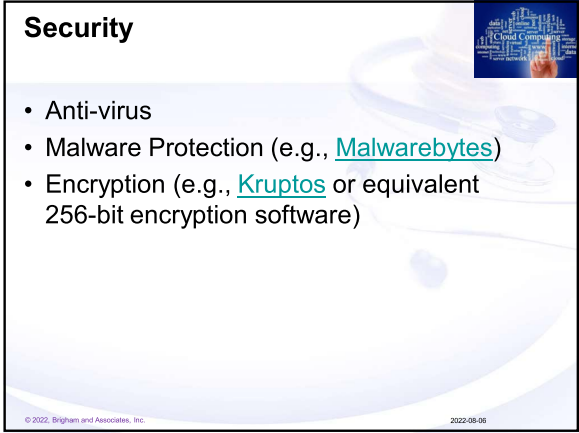
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**Security**

- Anti-virus
- Malware Protection (e.g., [Malwarebytes](#))
- Encryption (e.g., [Kruptos](#) or equivalent 256-bit encryption software)



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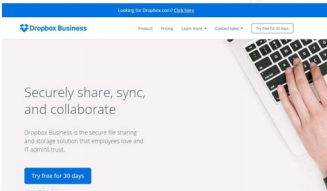
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**Internet**

File systems (e.g., [Hightail](#), [Dropbox](#), [SugarSync](#), [OneDrive](#), [Google Drive](#))



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**Communications and Collaboration Systems**

- Video Communications ([Zoom](#))
- Telephone (e.g., [Zoom](#))
- Conference call (e.g., [UberConference](#), [FreeConferenceCall](#))
- Video chat systems ([Zoom](#))
- Shared desktop (e.g., [Zoom](#), [Webex](#), [GoToMeeting](#), [JoinMe](#))



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### Process Management Systems

- [Monday.com](https://www.monday.com)
- Cloud-based customizable web and mobile app platform for work management, including tracking projects, deadlines, and team collaboration



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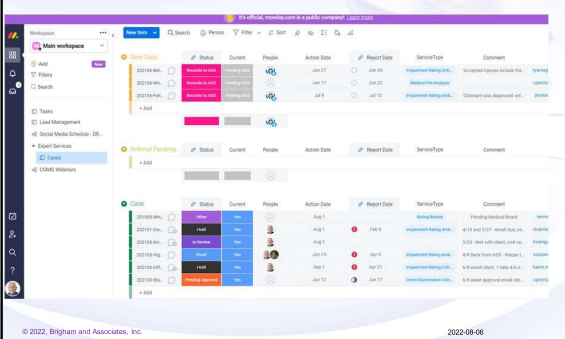
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### Monday.com



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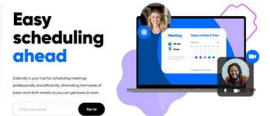
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### Time Saving Solutions

- Calendly.com
  - Hub for scheduling meetings, integrates with your calendar.
- Sanebox.com
  - Sorts and manages email messages
- Zapier
  - API tool



Dashboard

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**Financial**



- Time tracking (Billing) (e.g., [eBillity](#), [Bill4Time](#), [Time IQ](#), [TimeMe](#))
- Accounting (e.g., [QuickBooks Online](#))
- Credit card processing ([Stripe](#))
- Expense receipt management (e.g. [Expensify](#), [Itemize](#))
- Online forms (e.g., [Cognitoforms](#), [Wufoo](#))

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**Accounting**

**([QuickBooks Online](#))**



- Easy and fast
- Invoicing: create custom, professional invoices immediately (send with report) and get paid promptly
- Manage account receivables and payables
- Reports
- Multiple users may access (bookkeeper, accountant)

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**Online forms**

- Examples: [CognitoForms](#) and [Wufoo](#)
- Create online forms
- Templates or custom
- Example uses:
  - Referrals
  - Requests for information
  - Processing payment

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### Cloud-based Evaluation and Expert Specific

- Treatment and disability duration guidelines
- Reference
- Resource
- Physician background
- Expert directories
- Sharing economies, e.g., expertwitnessexchange.com




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### Resources

- <https://www.cbrigham.com/related-resources/>
- <https://www.impairment.com/related-links/>
- Free
  - [Date Calculator](#)
  - [BMI Calculator](#)
- Clinical
  - PubMed
  - Official Disability Guidelines
  - MD Guidelines
- AMA Guides
  - [AMA Guides \(ama-assn.org\)](#)
  - [Guides tools](#)
  - [Rating Guidance](#)




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- Physician background sites**
- [Expert Witness Profiler](#)
  - [HealthGrades](#)
  - [Certification Matters](#)
  - [Courtroom Insight](#)




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### Expert Witness Profiler

- Extensive information about you is available; more than you would ever imagine. You should be aware of what is known about you.
- Expert Witness Profiler exemplifies this with comprehensive, very detailed searches accessing all major legal research databases, also semi-private and proprietary. Typical search involves 15 – 25 hours of attorney time (performed in India). Fee \$495.
- Preliminary screening report, inexpensive (\$25); however, you can sign up and obtain at no charge. [expertwitnessprofiler.com/signup/brigham](http://expertwitnessprofiler.com/signup/brigham)

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**Expert Witness PROFILER**  
 Screening Date: 02/14/2016  
 Prepared for: Chris Brigham  
 Re: Christopher R. Brigham

**PRELIMINARY PROFILE SCREENING REPORT\***

SEARCH STRIKE STATE:  
 ((Chris or Christopher) w/2 Brigham) w/100 (Expert or Occupat or Family or Medicine or Impair or Disability or Injured or Maimed or "Worked Compensated" or "Personal Injury" or Assailed) or ("Chris R. Brigham" or "Christopher R. Brigham") and not ("Christopher L. Brigham")

Source	Volume Items
Attorney and Reporter	0
Challenges/ Exclusions (Daubert Practice)	0
Challenges/ Exclusions (Excluded from other sources)	0
Curricula Vitae and Resumes	0
Decrets - Database 1	2
Decrets - Database 2	2
Federal Agency Decisions	55
Jury Verdict Reports	12
Motions, Pleadings, Briefs and Orders Database 1	21
Motions, Pleadings, Briefs and Orders Database 2	18
Opinions / Case Law Database	7
State Agency Decisions	45
Transcripts and Depositions Database 1	0
Transcripts and Depositions Database 2	0
Transcripts and Depositions Database 3	0

[Order Now](#)

\*This Report was prepared for the purpose of [publicizing screening data](#) and is not to be used in building whether or not ordering full report is warranted. The screening results were arrived at by the use of the search strings referenced above. No attempts were made to expand or contract query language to broaden or limit findings, as would be the case if a full Profile report were to be ordered. Furthermore, no attempts were made to verify that the data is relevant to the particular report's question in the event there is more than one expert with this name, as would also be the case if a full Profile report were to be ordered. Study case law that results may vary from the numbers mentioned in this Preliminary Screening Report.

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**EXPERT WITNESS PROFILE**

Expert Witness Profile for: Christopher Ray Brigham, MD, MHA, FACER, FAEER, CAME, C.E.D.R.  
 Profile prepared for: Christopher Brigham

**Key Words:**  
 1. Workers Compensation Reimbursable  
 2. Insurance Claims Professional  
 3. Transforming Healthcare for Tomorrow  
 4. SHIP Risk Management Partner  
 5. Workers' Compensation Institute  
 6. Evidence-based medicine - EBEM  
 7. Risk Reduction Group  
 8. CDJ Institute  
 9. Cost Fee - Services - Adjuster  
 10. Global Workers' Compensation  
 11. Occupational Health  
 12. Medical Research for Health Care Professionals  
 13. National Workers' Compensation Coalition  
 14. Patient Recovery and Work Disability Professionals  
 15. Integrated Disability  
 16. SHIP Risk Management and Occupational Medicine Group  
 17. Work Comp Analysis Group  
 18. Collaborative Culture in Workers' Compensation (C2WC)  
 19. Complex Cases in Workers' Comp  
 20. Worker Compensation Cost Containment Professional Network  
 21. WORK COMP Insurance, FFA, Self-Serve, State and Municipal Government Professional Network  
 22. Work Comp Central  
 23. Health & Wellness  
 Source: <https://www.expertwitness.com/en/ChristopherBrigham>

**Source:**  
 If report generated a link or has been mentioned in a link post then website we included here.

**Website Citations:**  
 Christopher Brigham and ASA Database: [brigham.com](http://brigham.com)  
 Workers' Compensation & ASA Database: [brigham.com](http://brigham.com)  
 Date: 10/19/2014  
 DeWitt's Health: [www.dewitts.com](http://www.dewitts.com)  
 Health Diagnostics and a Shared Medical Institute  
 Brigham.com: 10/22/2014  
 Health and Finance  
 Brigham.com: 11/17/2014

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### Expert Directories

- Professional Organizations, e.g.,
  - [IAIME](#) (only accessible by members)
  - [ABIME](#)
  - Medical Specialty
- For Profit Organizations, e.g.:
  - [SEAK IMENet](#)
  - [JurisPro](#)

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### Libraries (Electronic or Physical)



- *AMA Guides* to
  - [Evaluation of Permanent Impairment](#)
  - [Evaluation of Disease and Injury Causation](#)
  - [Evaluation of Work Ability and Return to Work](#)
  - [Navigating Disability Benefit Systems](#)
- [AMA Guides Newsletter](#)

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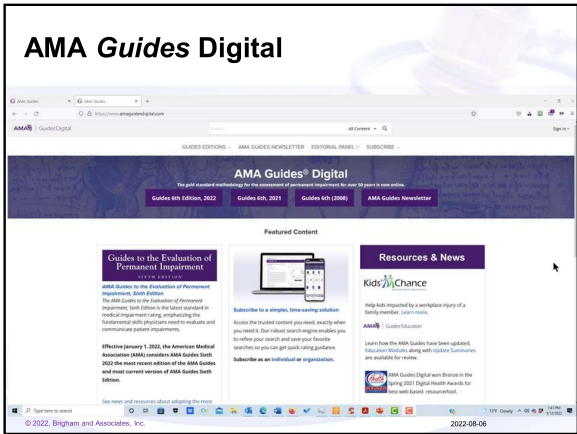
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### AMA Guides Digital



The screenshot shows the AMA Guides Digital website. At the top, there are navigation links for "GUIDES EDITIONS", "AMA GUIDES NEWSLETTER", "EDITORIAL PANEL", and "SUBSCRIBE". Below this is a banner for "AMA Guides® Digital" with buttons for "Guides 6th Edition, 2022", "Guides 6th, 2021", "Guides 6th (2008)", and "AMA Guides Newsletter". The main content area is titled "Featured Content" and includes sections for "Guides to the Evaluation of Permanent Impairment", "Resources & News", and "Kids'Chance".

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### Information and News Services

- Medical (e.g., [IAIME](#), [WFDRoundtable](#))
- Legal
- Discipline specific
  - [WorkCompCentral](#)
  - [WorkersCompensation.com](#)
  - [Managed Care Matters](#)



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### Human Resources

- [Upwork.com](#) is an efficient way to identify resources (talent) worldwide.
- Post a request and screen applicants.
- Highly effective, in my experience.

**How work should work**  
Forget the old rules. You can have the best people. Right now. Right here.

Find Talent Find Work



Trusted by Microsoft, Airbnb, GoDaddy, etc.

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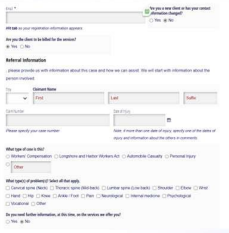
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### Referral Process for [cbrigham.com/referral](#)

- Two part:
  - Client registration
  - Case referral
- Utilize Cognitofoms
- Creates an entry in Monday.com used to manage cases and workflow
- Uploaded records sent directly to work partner in India.



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**Manage and analyze documents efficiently**

- Work with digital (.pdf) documents – no more paper.
- Securely obtain, store and transfer electronic documents.
- Use software systems to facilitate indexing, organizing, and reviewing records.
- Select and use external resources to organize and summarize documents.
- OCR documents and automatically create a detailed record index.
- Use appropriate software and hardware.

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**Documents**

- Only use electronic documents, both received and sent.
- Establish a convenient and safe method to obtain documents.
  - Secure portal (their site or your site).
  - If online referral form, consider upload directly to site.
  - Do not send/receive as attachments, insecure.
- OCR (Optical character recognize records).

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**Document and report management**

- Medical record organization, indexing, and analysis: typically offshore (e.g., [AGS Health](#)), typically performed in India or Philippines.
- Google “medical record indexing and chronology offshore.”

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### Document Indexing and Chronologies

- Documents (.pdf) uploaded via a secure file transfer system
- Services may include:
  - Medical record sorting, categorizing, labeling (with resulting organized .pdf document)
  - Indexing, bookmarking and hyperlinking (reference to .pdf)
  - Medical record organizing, and analysis (chronological order)
  - Identifying missing records
  - Narrative medical summary
  - Clinical summary/peer review
  - Integrating data into a report template
- End product: organized records as .pdf and MS Word document

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### Document Indexing and Chronologies

- Commonly used by IME companies; however, individual practices less familiar with these approaches.
- Considerations
  - Security and infrastructure
  - Registration in US (although services performed offshore)
  - Disaster recovery and business recovery
  - Experience and size
  - Recommendations
  - Turnaround time
  - Pricing
    - Per page (records received), or
    - Time

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DATE	PROVIDER	OCCURRENCE/TREATMENT	PDF REF.
Work status: No disability for work.			
06/17/13	John E. Jachlewski, DO	Order Oxycodone Rx: Approved Oxycodone 5% patch, 1 patch apply topically once per day as needed for pain, leave on for only 12 hours daily, and Oxycodone IR 5 mg 1 tablet by mouth every 4 hours as needed for pain.	100-104
06/18/13	Venere Physical Therapy, Ted Anderson, PT	PT Initial Examination CC: The patient works as a tennis Progress Note for the Four Seasons and has chronic shin splints and lateral knee. His ankles were used during a treatment and symptoms resolved. He wanted to get orthotics to prevent further problems. C/o shin splints and ankle pain during tennis or running for exercise on his free time. Rated the current pain at 2/10 and worst at 8/10. Physical exam: Bilateral tibial tendon and on left at 25 degrees, foot pronation, calcaneus wedges, and talar wedges. Bilateral knee: flex, Bunkers. ROM was normal. Dx: Sprain and strain of unspecified site of knee and leg. Assessment: Presents with a flexible foot and comfortable calcaneus wedges. He will be casted and an orthotic will be designed to his subtle medial position. Plan: PT 1 time a week for 3 weeks.	100-108
06/21/13	Venere Physical Therapy, Ted Anderson, PT	Discharge Note Attended 12 visits of PT. Shoulder has been doing better and he will be casting for the remainder for a month.	100-109
08/12/13	Steady Clinic, Lenei Roberts, J. O'Rourke	Progress Note CC: Follow up check, still has pain in the right shoulder at 8/10, was an orthopedic, recommended PT and also referred to a	110-111

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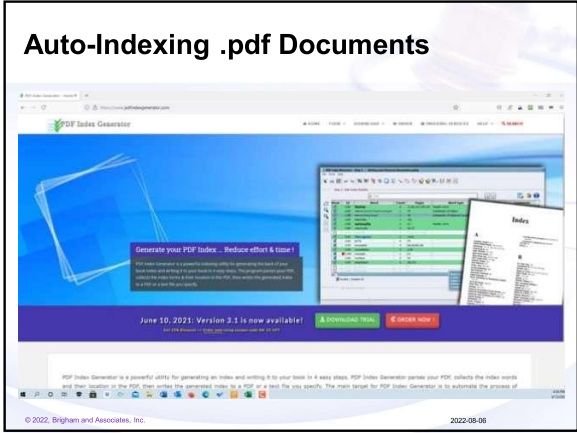
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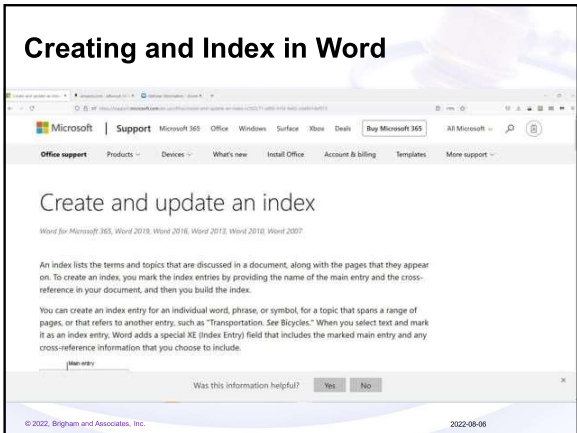
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### Perform a more efficient and higher quality evaluation

- Define and implement best practices for your practice.
- Reassess step-by-step what is the most effective approach.
- Use online history systems that produce a thorough best practices history, savings hours.
- Use software-integrated functional testing systems.

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### Online history and report production

- Forms are commonly completed by examinees; however, with online administration, the history portion of the report is completed automatically.
- We developed a process based on work years ago with "IME Create", utilizing CognitoForms and proprietary forms and templates. The result is very efficient, dramatically reduces physician time, and produces history that is more complete.

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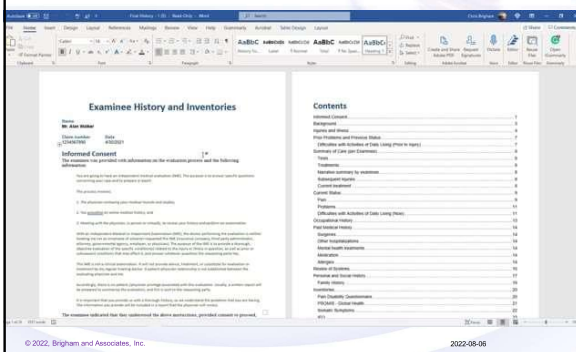
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### Online History



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**Physical Examination**



- Standardize best practices and use forms (online) to collect information.
- Use software integrated physical examination and functional testing systems (e.g., J-Tech Medical).

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**Virtual Evaluations**

- Many evaluations may be effectively performed online.
- Use Zoom or equivalent effectively.
- Consider the use of online histories and inventories.
- With technologies and “creativity”, many aspects of the physical examination are possible.

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**Prepare High-Quality Reports Efficiently**

- Reassess how you provide information to your client, typically a non-medical reader. Consider using tables, graphics, and timelines.
- Use templates, text blocks, text expanders, timeline generators, artificial intelligence transcription systems, and digital writing assistance tools to enhance your productivity.
- Use web-based information systems.
- Automatically create a Table of Contents and an Index.
- Use external resources to facilitate report production, proofreading, and assuring high quality.

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### My process.

(What works for me to assure quality, efficiency and profitability.)

1. Referral made online with secure uploading of documents.
2. Entry made in Monday.com and partner in India (AGS Health Care) is notified and organizes records, prepares medical chronology and OCRs records.
3. I review referral and summary, determining appropriate next steps, which may involve my associate physician in Pakistan, who will summarize clinical issues and prepare Timeline.
4. Using templates, inclusion files, text expanders, dictation software (more often type), and Grammarly, I prepare the report.
5. Report is proofed by my editor (Sarah Mayor of editask.com).
6. I create an invoice with QuickBooks online.
7. The report, attachments, invoice and W-9 are sent to the client.
8. Payment is sent to my accountant.

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### Referral to Report Process

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### Templates

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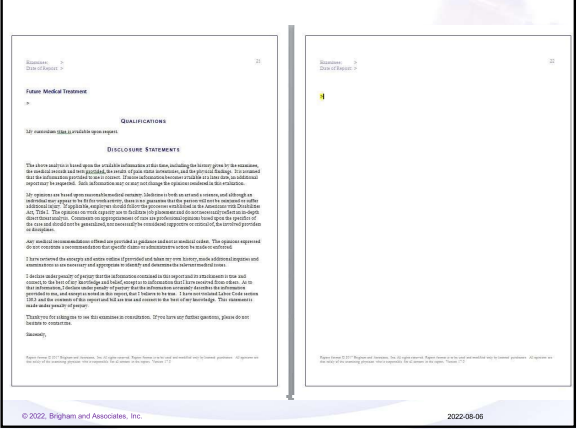
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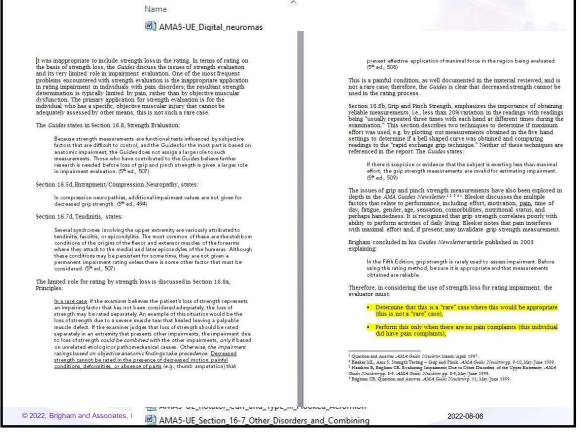
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**Technology Tools for Report Writing**

- Templates
  - Structured
  - Headings
  - Table of Contents
- Text Expansion
  - Textexpander - <https://textexpander.com>
- Online writing coach
  - Grammarly - <https://app.grammarly.com/>

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**Collaboration and Editing Resources**

- Many skilled cost-effective resources are available worldwide to assist you in being more effective.
- Editing of reports is essential to have a quality product.
  - Impossible to edit your own reports.
  - Editors must be skilled in the medicolegal domain and in editing.

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**Enhancing Profits**

- Enhance quality, so you are providing a higher valued product.
- Increase efficiency.
- Value the services that you provide, and have your client also value them.
- Base fees on service, not on your time.
  - (When you buy a product or want a service done, isn't what is most important is the value of what you purchased as opposed to how much time it took?)
- Establish a thoughtful Fee and Payment Policy.

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**Virtual IME Practice Management**  
 Interview with Kristi Baird of Axis Administrative Services



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**How do you market?**

- Demonstrate excellence in the work you perform, especially in a high-demand, highly valued niche.
- Demonstrate professionalism in every aspect, including:
  - Every step of the process
  - All tangible products (letterhead, cards, CV, forms, website)
- Identify your potential customers and connect with them.
- Develop a unique selling proposition (USP).
- Utilize appropriate marketing techniques.
  - Networking
  - Presentations
  - Directories, Listings
  - Brokers
  - Internet

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**How do you market?**

- Meet your clients in person or virtually.
- Speak in person or virtually.
- Network.
- Develop an effective web presence.
- Use social media for promotion.
- Create an effective marketing plan and execute it!

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### Professional image

- Document style
- Logo (branding)
- Font style
- Email étiquette
- Signatures (with confidentiality notice)



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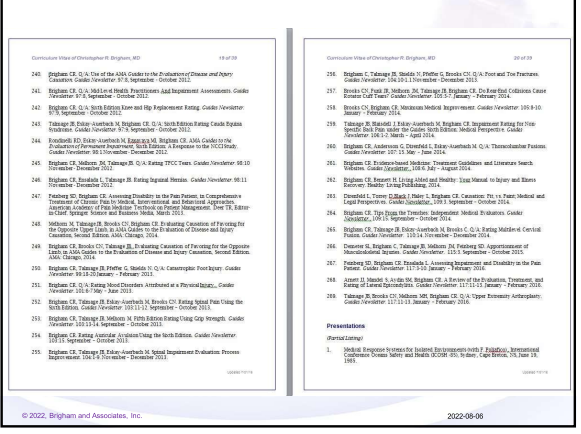
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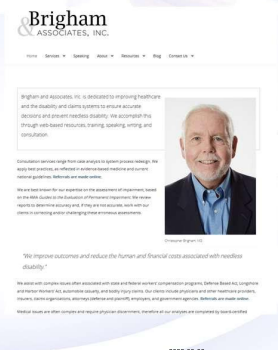
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### Website Development

- Domain registration ([AIT Domains](#), [GoDaddy](#))
- Website hosting (e.g., [Bluehost](#))
- Website creation ([custom](#), [WordPress](#)), templates, or theme-based)



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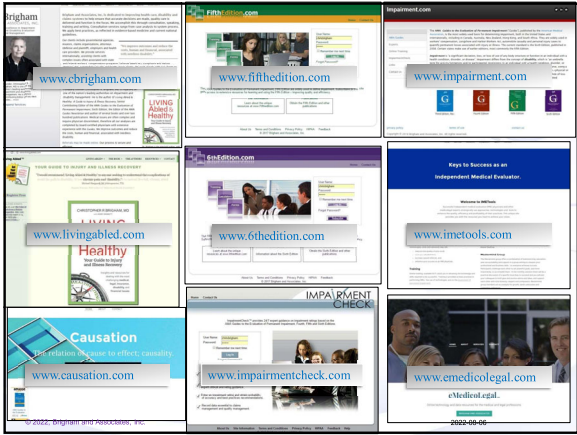
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### Online Marketing

- Social Media (e.g., [LinkedIn](#), [Twitter](#), [Facebook](#))
- Lists and email systems (e.g., [Constant Contact](#), [MailChimp](#))

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### LinkedIn

<https://www.linkedin.com/in/chrisbrigham>

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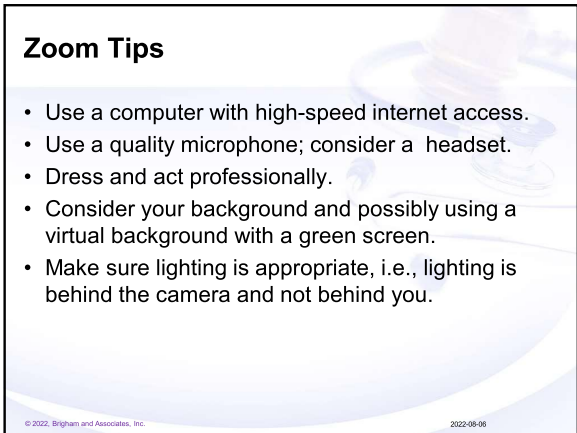
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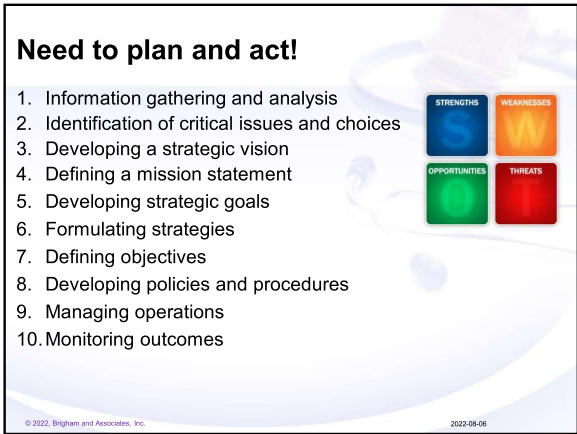
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